

PROMOTE THE USE OF E-BUSINESS IN THE SME COMMUNITY

ISU-Lite Form with DTTN

User Manual

Version 0.2

Date: 10 Oct 2007

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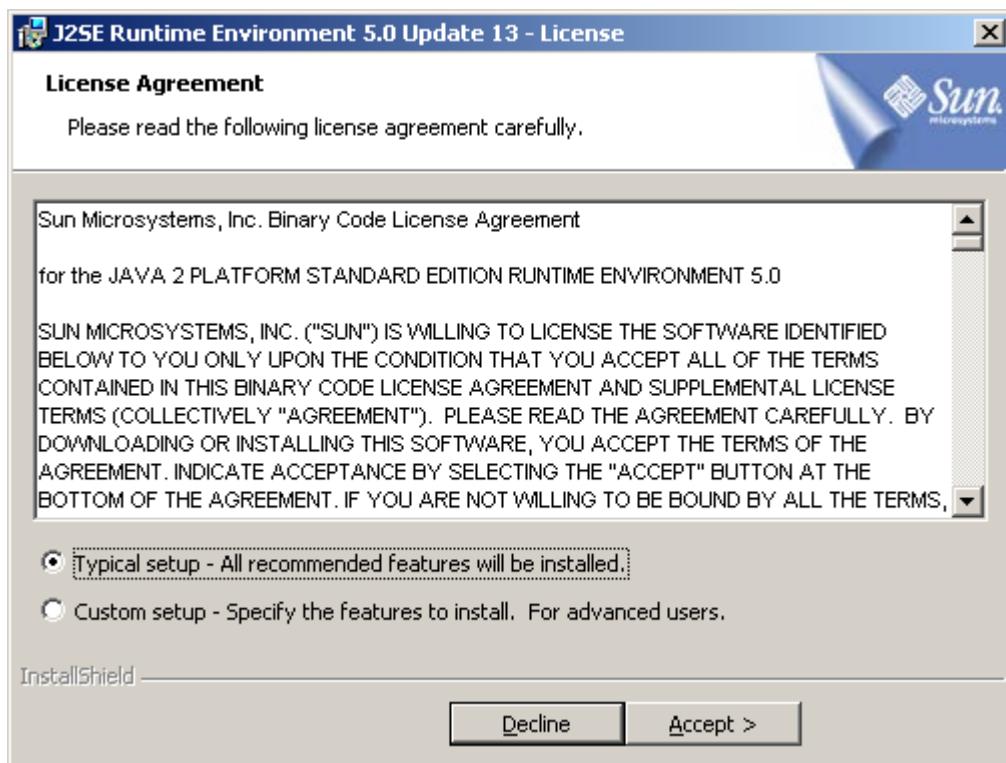
System Installation

The installation of ISU-Lite is simple. You can install the system in PC meeting the following requirement:

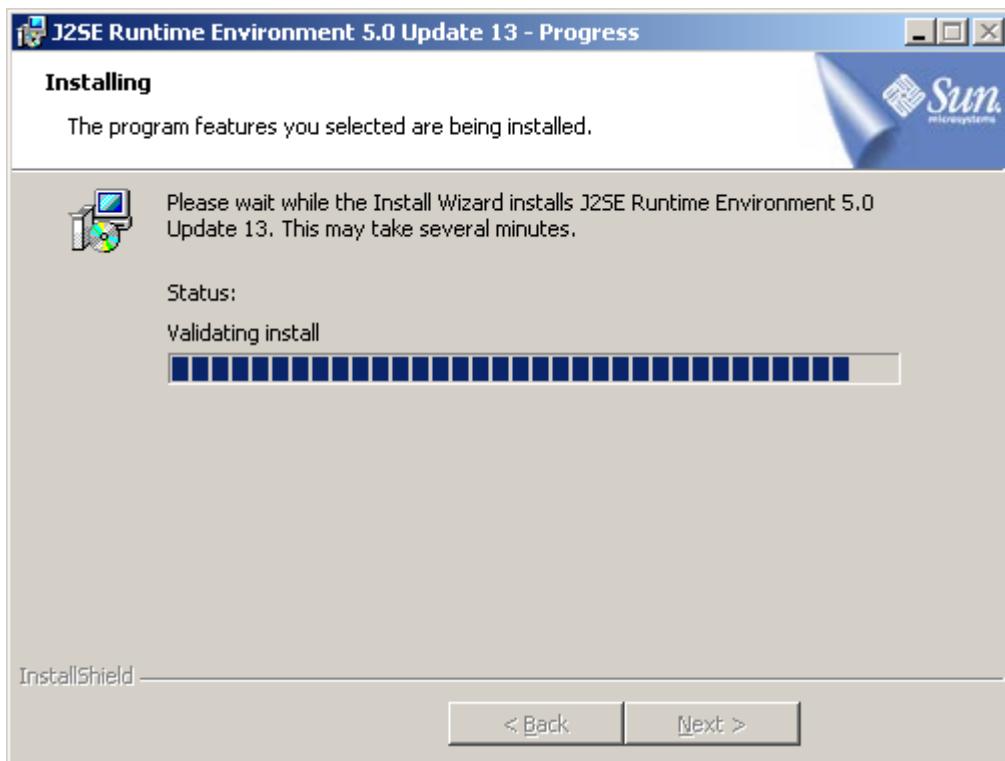
- Intel PC with Pentium 3 (/AMD K7) or above with 10/100BaseT Ethernet Network Interface Card and 512MB RAM or above
- Display resolution 1024 x 768
- Microsoft Windows 98, ME, 2000 or XP (English or Traditional Chinese Version)
- Printer Driver
- Sun Java Running Environment (JRE) 1.5 or above
- Internet Explorer 6.0

For installation, please insert the installation CD and then follow the instruction of the installation program.

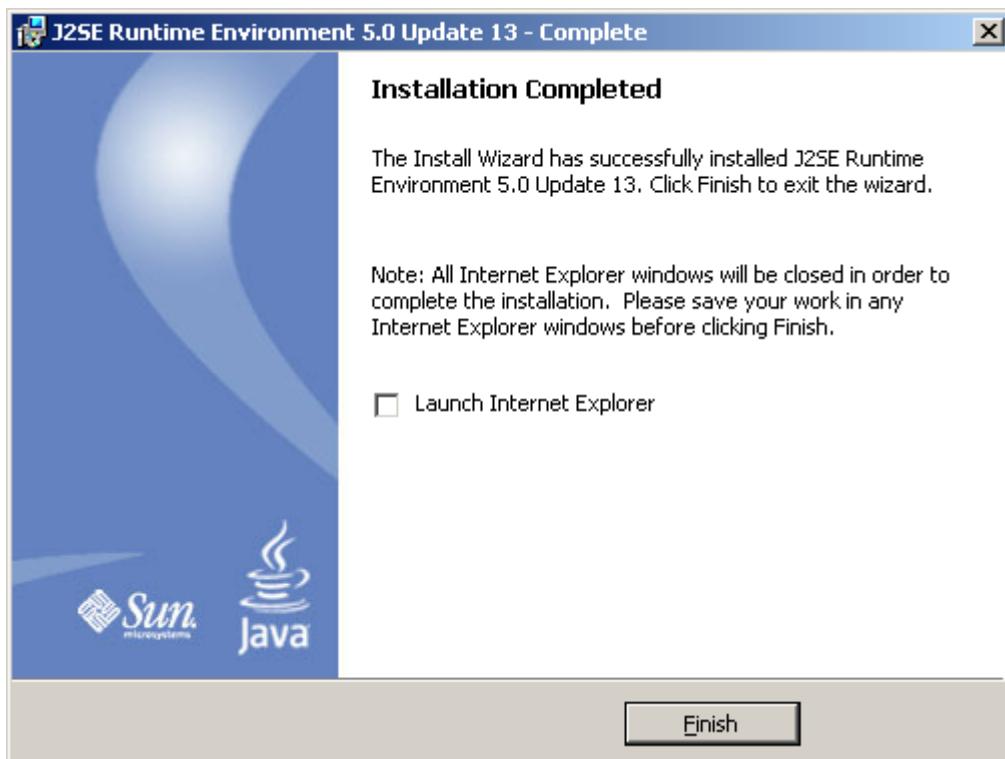
If the PC does not have JRE 1.5 or above installed, the installation program will prompt to install JRE 1.5



Check "Typical setup" and click Accept



The JRE will start to install

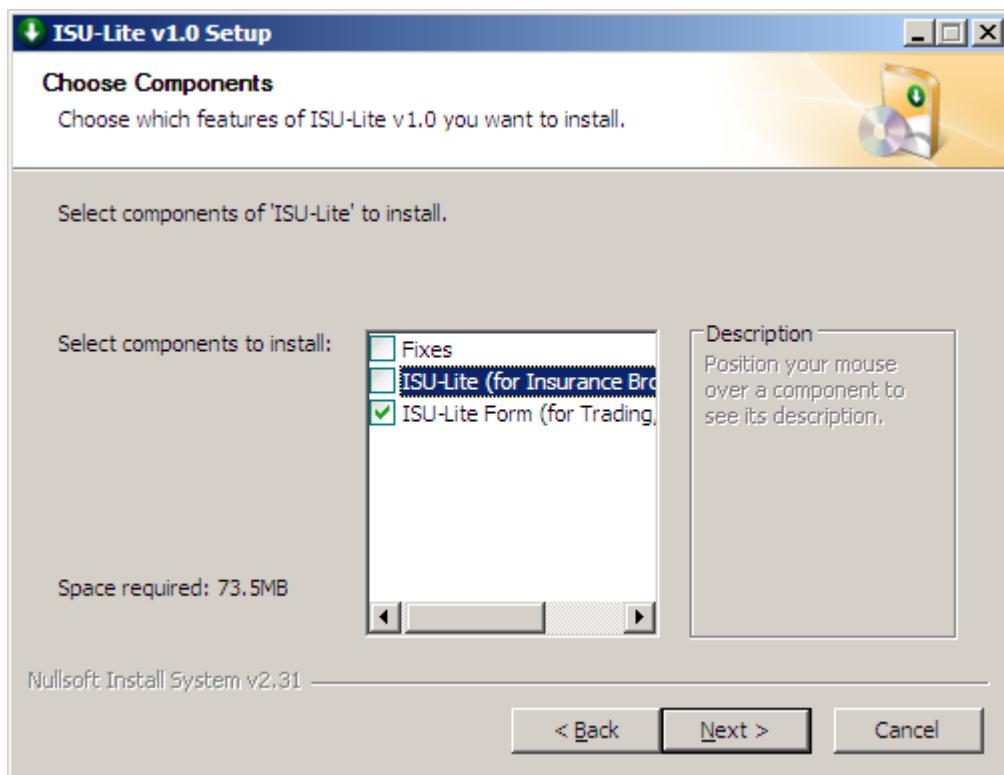


Click Finish at the end of the JRE 1.5 setup

After JRE 1.5 installed or JRE 1.5 or above had been installed on the PC, ISU-Lite installation screen will prompt

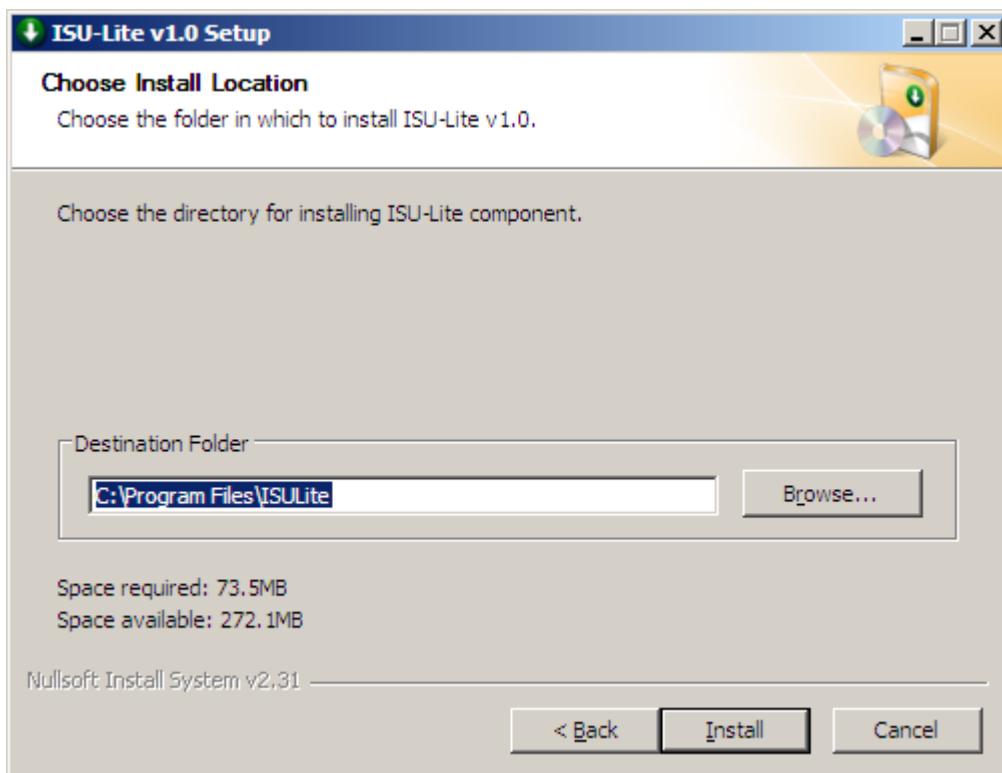


Click Next

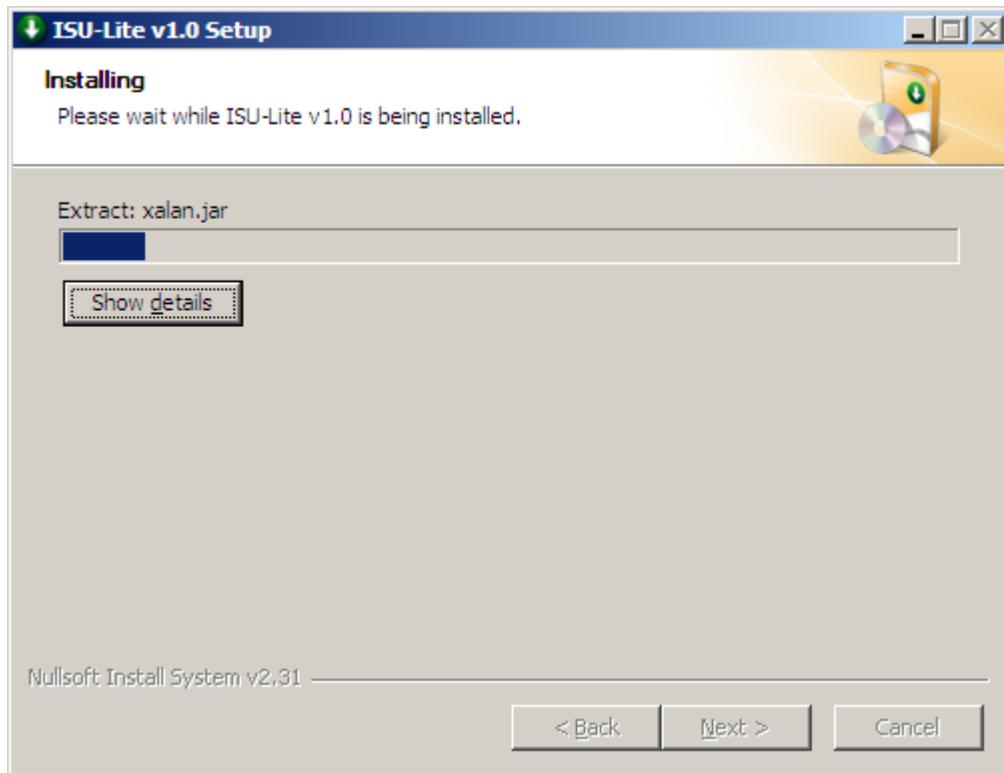


There will be three components available for installation, click the last one 'ISU-Lite Form (for Tranding/Shipping SME) for installation. Then click Next.

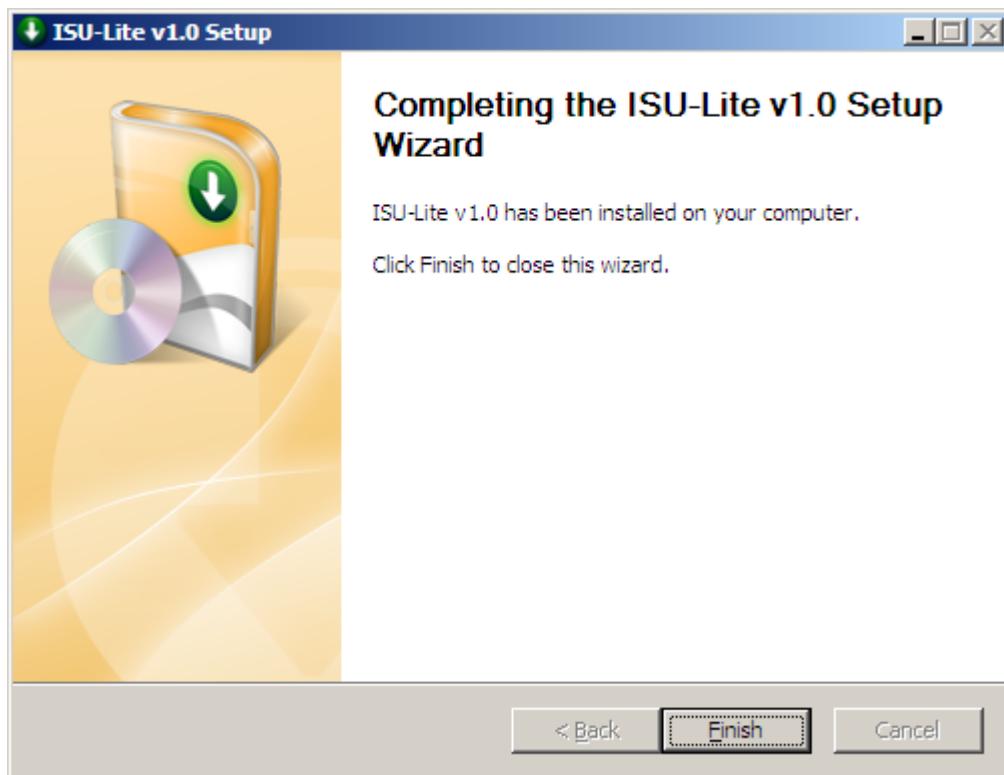
Then, the following screen will be shown and you can change the default installation directory. Please make sure you have sufficient disk space in doing so.



After selecting the right installation path, click Next. The program files are being copied to your workstation.



Finally, the installation completed screen will be shown as below:

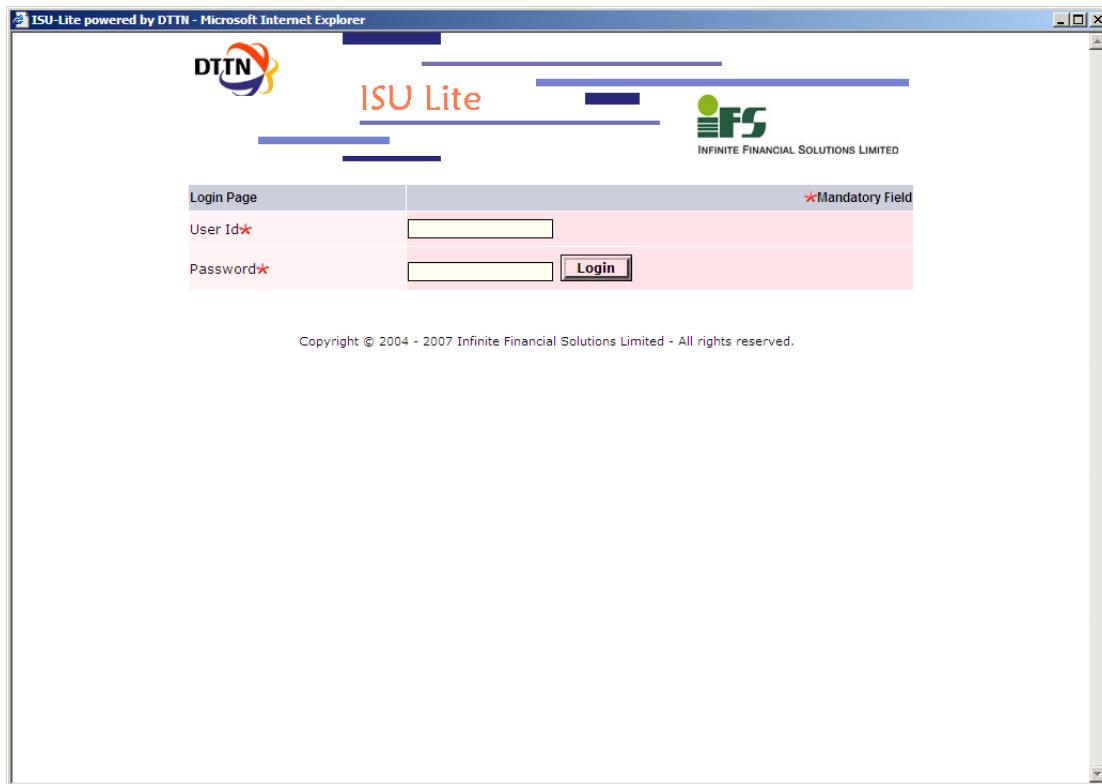


Click Finish to complete the installation process.

You can start the program by following the 'Start', 'Program' menu and select ISU-Lite Form from ISU-Lite program group:



The following screen will be poped up:



Your installation is completed now and you can follow the registration step to start using ISU-Lite Form now.

System Registration

After installing the software successfully, you have to resigter the system before it can be used. Firstly, please start the application by clicking the icon on desktop. Then, you can see the login screen as below:

ISU-Lite powered by DTTN - Microsoft Internet Explorer

 **ISU Lite**  INFINITE FINANCIAL SOLUTIONS LIMITED

Login Page		★Mandatory Field
User Id*	<input type="text"/>	
Password*	<input type="password"/>	Login

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There is a default administrator built-in in the system. Please login the system with the information as below:

User ID: admin Password: password

ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite** **IFS**
INFINITE FINANCIAL SOLUTIONS LIMITED

Login Page	★Mandatory Field
User Id*	<input type="text" value="admin"/>
Password*	<input type="password" value="*****"/> <input type="button" value="Login"/>

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Next, press the 'Login' button, you will be able to sign-in the system. As the system is not yet registered, there are only two functions can be used. One is for setting up the system parameters and the other one is logoff.

ISU - ISU-Lite powered by DTTN - Microsoft Internet Explorer

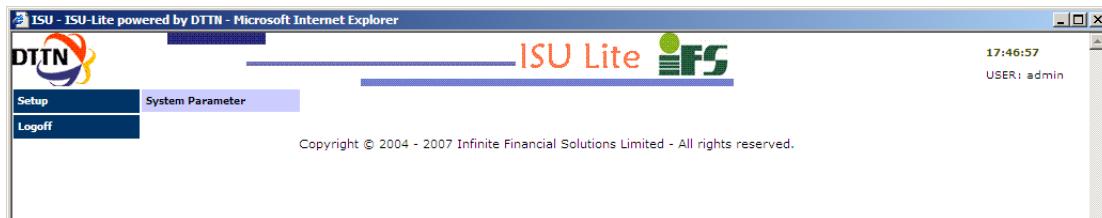
DTTN ISU Lite IFS

17:37:11

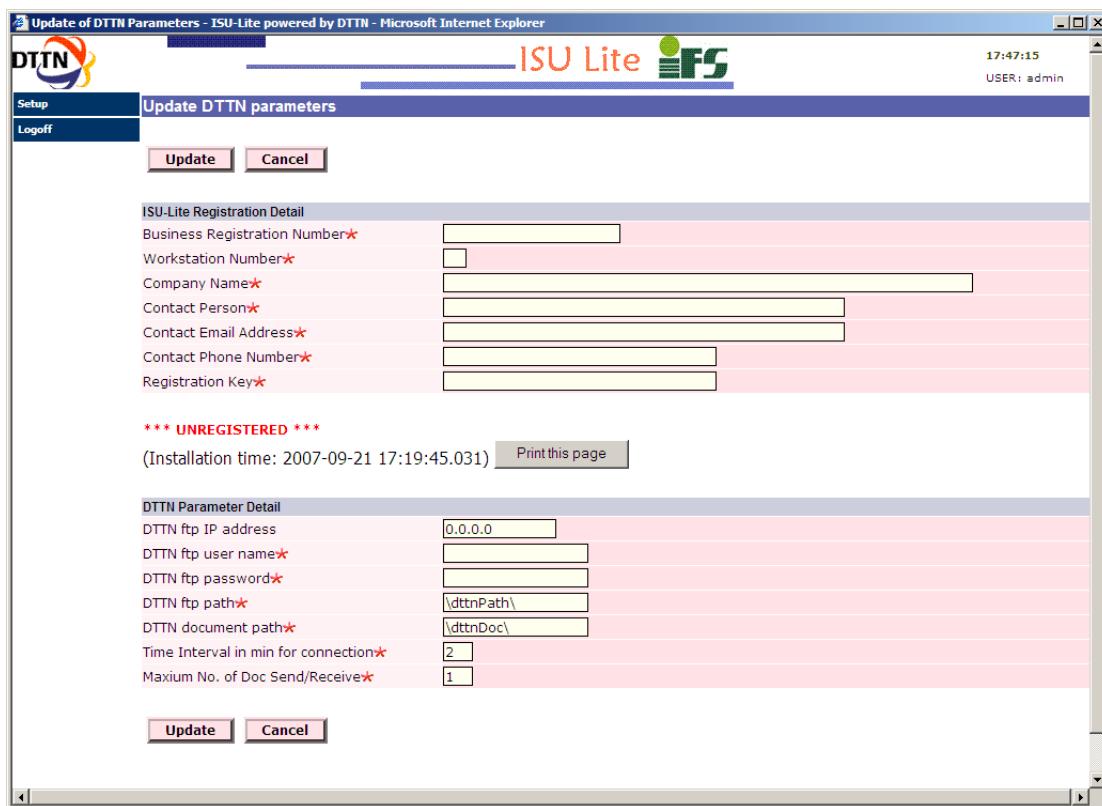
USER: admin

Then, mouse over the 'Setup' menu and click the 'System Paramter' sub-menu as below:

ISU-Lite Form



The 'Update DTTN parameters' function page appears. You can see that the "*** UNREGISTERED ***" message is shown with installation time.



The meanings of the parameters are as follows:

Parameter	Description
Business Registration Number	The business registration number of your company
Workstation Number	It is the workstation number with ISULite installed. 2 free workstations installation can be used.
Company Name	The name of your company
Contact Person	The primary contact person of your company
Contact Email Address	The email address of the contact person
Contact Phone Number	The phone number of the contact person
Registration Key	The key required for registering the system for use
DTTN ftp IP	The IP address of DTTN host for sending and receiving documents by File Transfer Protocol (ftp)
DTTN ftp user name	The user name for connecting to DTTN host
DTTN ftp password	The password of the user for connecting to

	DTTN host
DTTN ftp path	The local path for storing ftp documents. The system will create this path for you.
DTTN document path	The path where DTTN document is stored, the system will create this path for you.
Time interval in min for connection	This is the time interval in minutes for blocking the re-connection to DTTN. Used for traffic volume control.
Maximum No. of Doc Send/Receive	This is the maximum number of document sent to or received from DTTN each time. Used for traffic volume control.

The DTTN parameter detail will be provided by DTTNCo. You do not need to complete these information for registration. However, the ISU Lite registration parameters must be completed before registration can be done successfully.

After completing the detail as above, you can click the 'Update' button to store the information in the system. Then, you can click the print button to print the screen information. Next, you can fax the screen printout to IFS (fax number: 2134-1292) for registration. A registration key will be provided to you afterwards.

Update of DTTN Parameters - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite IFS

17:52:50
USER: admin

Setup Update DTTN parameters Logoff

Update Cancel

ISU-Lite Registration Detail

Business Registration Number*	111111111111
Workstation Number*	1
Company Name*	Sample Company
Contact Person*	Mr. Chan
Contact Email Address*	chan@sample.com
Contact Phone Number*	12345678
Registration Key*	2f9dc6ca7d8b65c3c2944df937b9db9d

*** UNREGISTERED ***
(Installation time: 2007-09-21 17:19:45.031) [Print this page](#)

DTTN Parameter Detail

DTTN ftp IP address	192.168.0.141
DTTN ftp user name*	sample
DTTN ftp password*	password
DTTN ftp path*	\dttnPath\
DTTN document path*	\dttnDoc\
Time Interval in min for connection*	2
Maximum No. of Doc Send/Receive*	1

Update Cancel

After received the resigration key, please input the key in the 'Registration Key' field. Click update to store the key into the system.

Action Completed - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite IFS

17:49:30
USER: admin

Setup Logoff

UPDATE action is successfully completed.

OK

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Then, you can see that the '*** UNREGISTERED ***' message disappeared as below:

Update of DTTN Parameters - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite IFS

17:53:20
USER: admin

Setup Update DTTN parameters Logoff

Update Cancel

ISU-Lite Registration Detail

Business Registration Number*	111111111111
Workstation Number*	1
Company Name*	Sample Company
Contact Person*	Mr. Chan
Contact Email Address*	chan@sample.com
Contact Phone Number*	12345678
Registration Key*	2f9dc6ca7d8b65c3c2944df937b9db9d

DTTN Parameter Detail

DTTN ftp IP address	192.168.0.141
DTTN ftp user name*	sample
DTTN ftp password*	password
DTTN ftp path*	\dttnPath\
DTTN document path*	\dttnDoc\
Time Interval in min for connection*	2
Maximum No. of Doc Send/Receive*	1

Update Cancel

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After successful registration, you can logoff and login the system again. The full function can be used by the administrator now.

ISU - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

17:53:39
USER: admin

Connect DTTN
Create Application
Maintain Application
Maintain Policy
Process Payment
Enquiry
Setup
Logoff

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Change Password

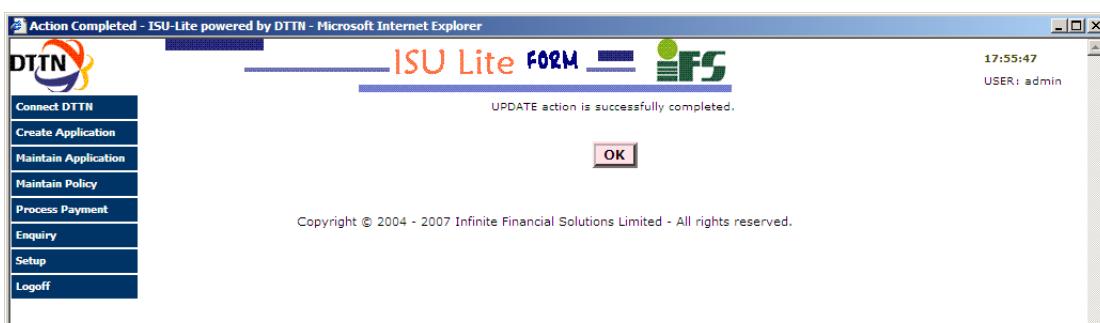
It is suggested changing the password of administrator immediately. Mouse over the 'Setup' menu and click 'Change Password'.



Input the new password and confirm the new password in the screen as below:



Click the Update button to update the password.



Then you can logoff the system and login again with the new password.

Source Code Application

As you have already made the registration with us, source code of the ISU-Lite is also available for your application.

To make the application, it is necessary for you to quote “ISU-Lite Source Code Application” on a form and fax to 2134 - 1292 together with the following information:

- Company Name
- Contact Person
- Contact E-mail Address
- Contact Phone Number

The source code will be provided to you afterwards.

User Maintenance

You can create new users in the system with pre-defined functional groups. There are the following functional groups with different functional rights:

Function	ALL	Supervisor	Operator
Connect DTTN	Yes	Yes	No
Create Application	Yes	Yes	Yes
Maintain Application	Yes	Yes	Yes
Maintain Policy	Yes	Yes	Yes
Process Payment	Yes	Yes	Yes
Enquiry	Yes	Yes	Yes
Setup			
Change Password	Yes	Yes	Yes
System User Maintenance	Yes	No	No
Broker Maintenance	Yes	Yes	No
Insurer Maintenance	Yes	Yes	No
Customer Maintenance	Yes	Yes	No
System Parameter Maintenance	Yes	No	No

Select 'System User' from the 'Setup' menu.



The system user list will be shown as below.



You can click the 'Create' button to create a new system user or select a user then click 'Update' to update the user information; 'Enquire' to view the user information or 'Delete' to delete the system user.

For creating a new user, the screen is shown as below:

ISU Lite FORM

Create User

User Detail

User Id*: super1

User Name*: Supervisor 1

User Role*:

>Password*:

Confirm password*:

MANDATORY FIELD

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Just input the details and click the 'Create' button to create the new user.

ISU Lite FORM

Action Completed

create action is successfully completed.

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After the creation, you can see the list of customer with the newly added.

ISU Lite FORM

User Information Maintenance

For Create a new Record, please click on the Create Button. For Update, Enquire and Delete record, please select the record with click on radio button; and click on Update/Enquire/Delete button.

	User Id	User Name	User Role
<input type="radio"/>	admin	Administrator	ALL
<input type="radio"/>	super1	Supervisor 1	Supervisor

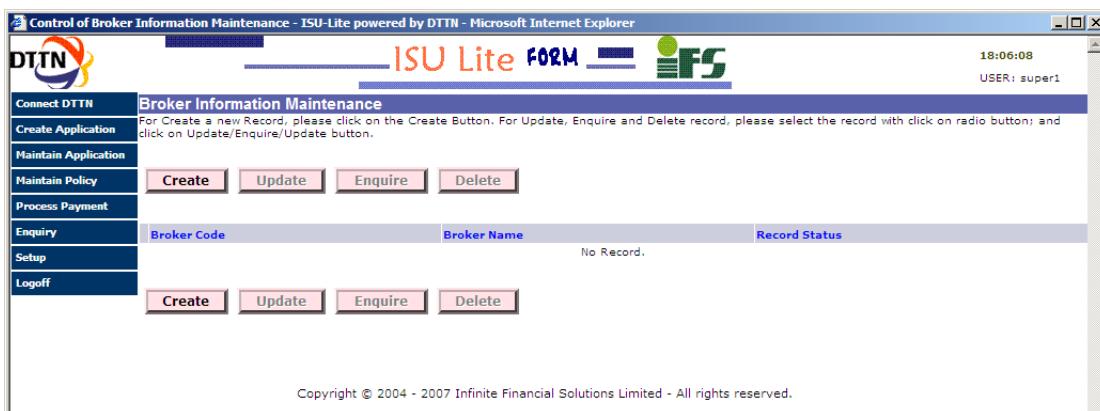
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Broker maintenance

You can maintain the available brokers in the system through the broker maintenance function. Select 'Broker' from the 'Setup' menu.



Similar to 'System User' maintenance, a list of available brokers will be shown.



Click the 'Create' button, then a screen of broker information will be shown as below.

You can input the detail accordingly. Click 'Create' to go to the 'Confirmation' page or 'Cancel' to cancel the creation.

Create of new Broker Information - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

18:07:25
USER: super1

Create Broker Information	
Connect DTTN	
Create Application	
Maintain Application	Create Cancel
Maintain Policy	
Process Payment	
Enquiry	Broker Code* B1
Setup	Broker Name* Sample Broker
Logoff	Address 1* 1 Broker Street Hong Kong
	Address 2
	Address 3
	Chinese Address 1
	Chinese Address 2
	Chinese Address 3
	Contact Person* Mr. Lam
	Contact Person Telephone* 12345678
	Contact Person Email* lam@broker1.com
	Premium Collection Account* 0
	Host Current Account* 0
	Broker Commission Percentage%* 0
	★Mandatory Field
	Create Cancel

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Click 'Confirm' if the input information is correct.

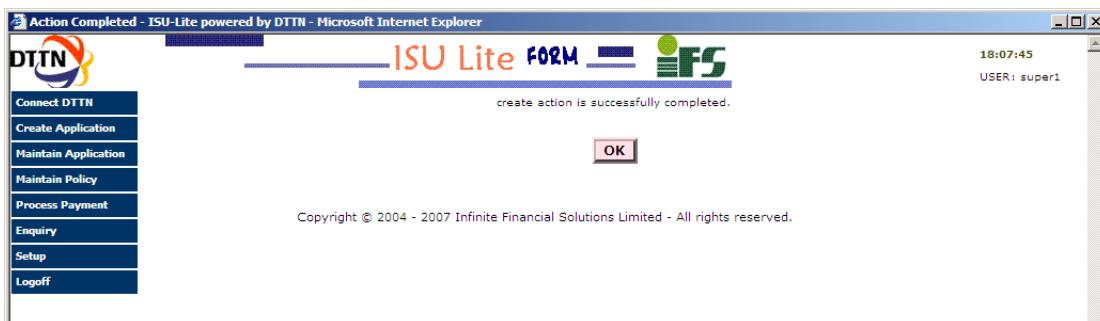
Confirmation of Broker Information Creation - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

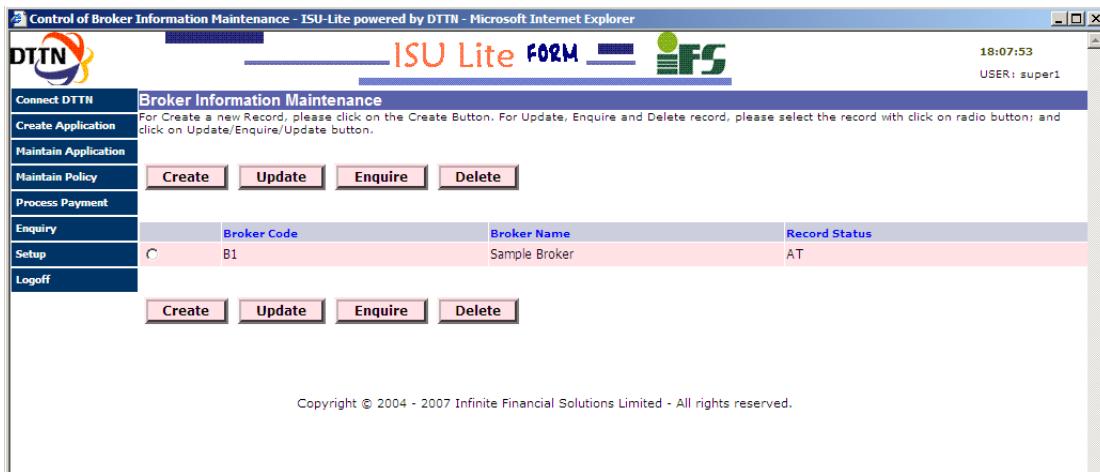
18:07:37
USER: super1

Confirmation Broker Information Creation	
Connect DTTN	
Create Application	
Maintain Application	Confirm Back
Maintain Policy	
Process Payment	
Enquiry	Broker Code B1
Setup	Broker Name Sample Broker
Logoff	Address 1 1 Broker Street Hong Kong
	Address 2
	Address 3
	Chinese Address 1
	Chinese Address 2
	Chinese Address 3
	Contact Person Mr. Lam
	Contact Person Telephone 12345678
	Contact Person Email lam@broker1.com
	Premium Collection Account 0
	Host Current Account 0
	Broker Commission Percentage% 0
	Confirm Back

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Now, you can see the newly created broker record.



Customer Maintenance

The customer maintenance function is similar to broker maintenance as well as system user maintenance. The screens are captured below for easy reference.

The screen below list the selected customers by the search criteria

Customer information creation form.

Confirmation page.

Confirmation of Customer Information Creation - ISU-Lite powered by DTTN - Microsoft Internet Explorer

ISU Lite FORM IFS

18:09:58
USER: super1

Connect DTTN	Confirmation Customer Information Creation			
Create Application				
Maintain Application				
Maintain Policy				
Process Payment	Customer Detail			
Enquiry	Customer Type	3	Relationship Officer	9999
	Customer ID	11111111		
Setup	English Name	Sample Company		
Logoff	Surname		First Name	
	Other Name		Chinese Name	
	Telephone		Fax	
	Email	sample@sample.com		
	RO Number		RO English Name	
	Address Type	06	Local Address Flag	Y
	Flat		Floor	
	Block		Phase	
	Building/Estate/Village			
	Street/Road	Sample Street		
	District/Town		Area/Region	
	Post Code		Zip Code	
	City/State/Province		Country	
	Settlement Account			
	From FCR	N		
	Address Line 1	Sample Street,		
	Address Line 2			
	Address Line 3			
	Address Line 4			
<input type="button" value="Confirm"/> <input type="button" value="Back"/>				

Resulting list as below.

Control of Customer Information Maintenance - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS 18:10:22 USER: super1

Customer Information Maintenance

Search Customer
Please enter the search criteria or enter "*" for wildcard search, click on Search button for Update, Enquire and Delete Record. For Create the new record, please click on Create Button.

Customer ID	<input type="text" value="*"/>
Customer Name	<input type="text"/>

Search

For Create a new Record, please click on the Create Button. For Update, Enquire and Delete record, please select the record with click on radio button; and click on Update/Enquire/Delete button.

Create **Update** **Enquire** **Delete**

Your Search criteria are: Customer ID = *

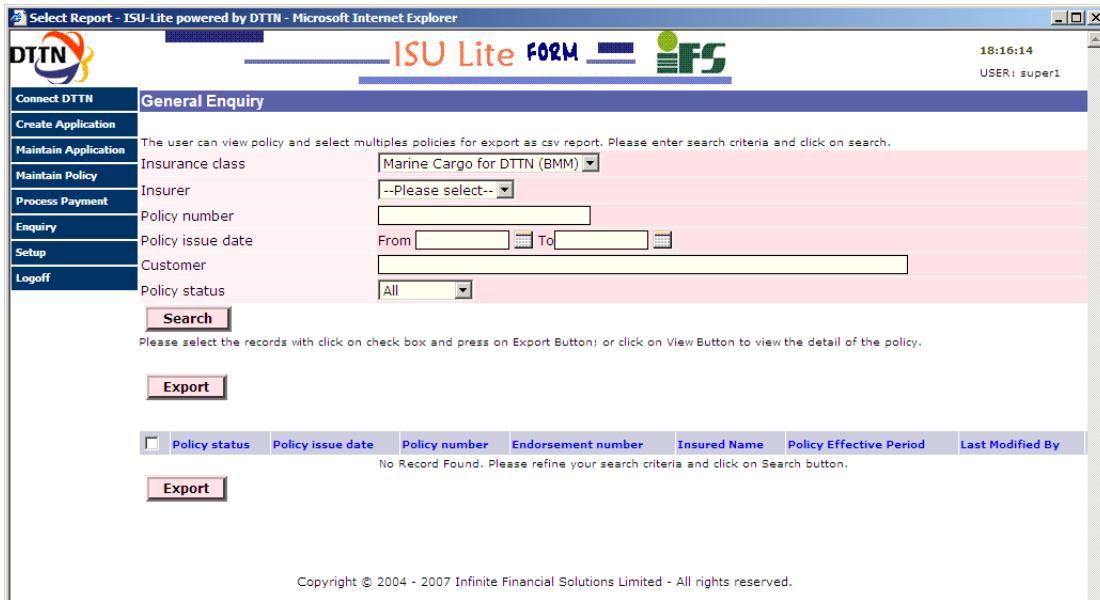
	Customer ID	Customer Name	Customer Type	Record Status
<input checked="" type="radio"/>	11111111	Sample Company		AT

Create **Update** **Enquire** **Delete**

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Enquiry Function

You can enquire the applications in the system through the 'Enquiry' function.



ISU Lite FORM

18:16:14
USER: super1

General Enquiry

The user can view policy and select multiples policies for export as csv report. Please enter search criteria and click on search.

Insurance class: Marine Cargo for DTTN (BMM)

Insurer: --Please select--

Policy number:

Policy issue date: From [] To []

Customer:

Policy status: All

Search

Please select the records with click on check box and press on Export Button; or click on View Button to view the detail of the policy.

Export

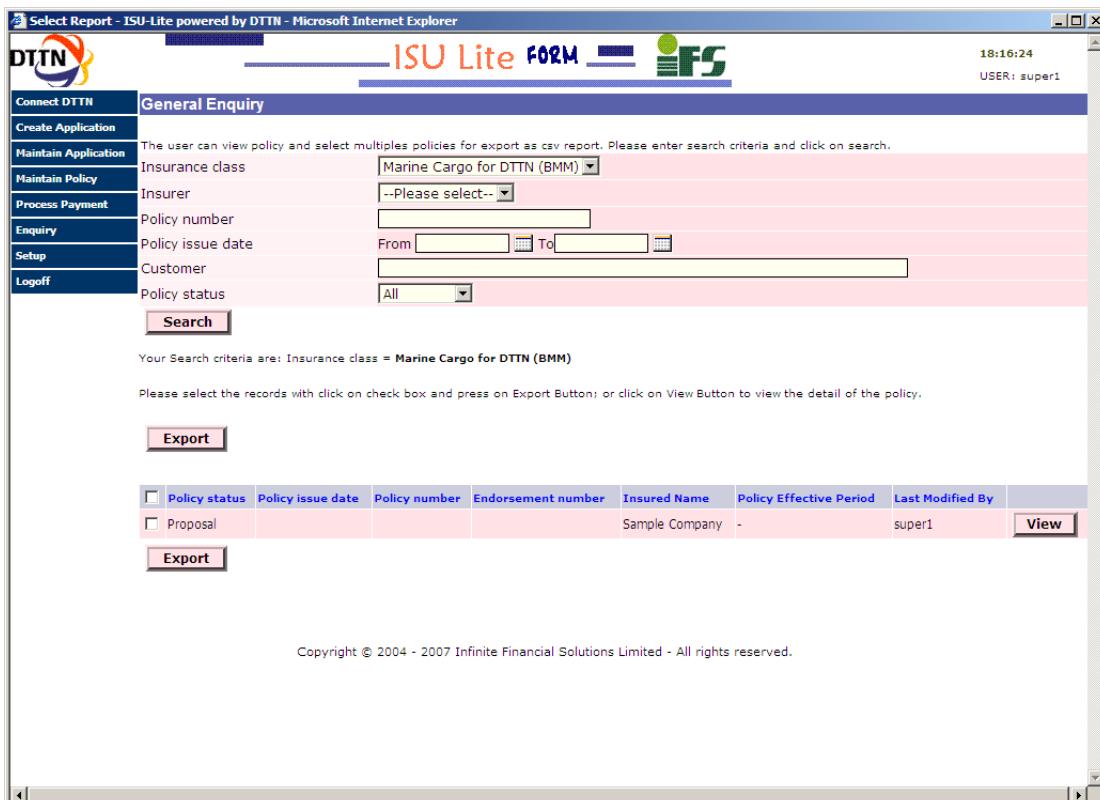
Policy status Policy issue date Policy number Endorsement number Insured Name Policy Effective Period Last Modified By

No Record Found. Please refine your search criteria and click on Search button.

Export

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After input the search criteria, click the 'Search' button, a list of applications meeting the criteria will be shown.



ISU Lite FORM

18:16:24
USER: super1

General Enquiry

Your Search criteria are: Insurance class = Marine Cargo for DTTN (BMM)

Please select the records with click on check box and press on Export Button; or click on View Button to view the detail of the policy.

Export

Policy status Policy issue date Policy number Endorsement number Insured Name Policy Effective Period Last Modified By

Proposal From [] To [] - super1 View

Export

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Click the 'View' button of the selected application to view the detail.

Marine Cargo Insurance Enquiry - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

18:16:38
USER: super1

Connect DTTN	Insurance Application Please click on each tab to confirm all necessary information for Create/Modify Application.							
Create Application								
Maintain Application	Application and Policy Details							
Maintain Policy	DTTN Documents							
Process Payment	Document Type	Filename	Put/Get	Put/Get Date				
Enquiry	Insurance Declaration	20070921\ID070921000000.XML	PUT					
Setup	Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Logoff	Insurance customer type	Customer Type	Customer ID	Customer Name				
	Insured	BR Number	11111111	Sample Company				
	Proposer	BR Number	11111111	Sample Company				
	OK							

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The detail pages is similar to the creation page. However, the DTTN document list is also attached. You can click the link 'View' to see the document detail. The document detail will be popped up as below.

ISU Lite with DTTN -- Web Page Dialog

DTTN ISU Lite FORM IFS

DTTN Documents

Filename 20070921\ID070921000000.XML

```
[?xml version="1.0" encoding="UTF-8"?]
[InsuranceDeclaration]
[OpenPolicyNumberID][TO BE FILLED][/OpenPolicyNumberID]
[TotalAmountCurrencyID="TO BE FILLED"]0[/TotalInsuredAmount]
[Header]
[UniqueDocumentNumberID]20070921\ID070921000000
[IssueDateTime]2007-09-21 18:15:40.828[/IssueDateTime]
[/Header]
[InsuredParty]
[Identification]
[IdentificationID][TO BE FILLED][/ID]
[Name]
[/Identification]
[/InsuredParty]
[InsuredSignatoryParty]
[Party]
[Identification]
[IdentificationID][TO BE FILLED][/ID]
[Name][TO BE FILLED]
[/Name]
[InsuredSignatoryParty]
[InsuranceDeclarationSummaryLineItem]
[InsuredValueAmount]
[AmountCurrencyID="TO BE FILLED"]0[/AmountCurrencyID]
[PolicyEffectiveDateTime]2007-09-21 18:15:40.828[/PolicyEffectiveDateTime]
[InsuranceCoverageTerms]
[Clause]
[TO BE FILLED]
[/ShipmentStage]
[ShipmentStartPoint]
[OriginTransportLocation]
[Location]
[Name]
[Hong Kong]
[/Name]
[/Location]
[/OriginTransportLocation]
[ShipmentStage]
[InsuredCargoLineItem]
[ProductItem]
[Remarks]
[Description]
[TO BE FILLED]
[/Description]
[/Remarks]
[/ProductItem]
[InsuranceDeclarationSummaryLineItem]
[/InsuranceDeclaration]
```

Content

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Create Application

You can create a new insurance application from the 'Create Application' menu. In the insurance application creation page, you can select the broker from the created broker list and others are being default values.

Click 'Create' to input further detail.

The input details are grouped in to 'Customer', 'Application', 'Policy', 'Details', 'Broker', 'Insurer', 'Party' and 'Settlement'.

In the customer tab, you can click the 'Add' icon to add the customer.

Then the customer selection screen will be shown. Input the search criteria and then click 'Search' to search the customer record.

ISU Lite with DTTN -- Web Page Dialog

DTTN ISU Lite FORM ifs

18:12:10
USER: super1

Search Customer

Customer Type: BR Number

Customer ID:

Customer Name:

Search **Close**

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Then, the list of customer matching the result will be shown.

ISU Lite with DTTN -- Web Page Dialog

DTTN ISU Lite FORM ifs

18:12:22
USER: super1

Search Customer

Customer Type: BR Number

Customer ID:

Customer Name:

Search **Close**

For adding the customer to the application, please click the appropriate user name from the following list.

Sample Company(11111111)

Click the desired customer and the selected customer will be added onto the application creation screen.

Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** **IFS**

18:12:31
USER: super1

Connect DTTN	Insurance Application							
Create Application	Please click on each tab to fill in all necessary information for Create/Modify Application.							
Maintain Application	Create Application							
Maintain Policy	★Mandatory Field							
Process Payment	Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Enquiry	Please Click on the add button for new Row. For enter the customer ID and Name, please click on the icon beside the customer field.							
Setup	Insurance customer type*	Customer Type*	Customer ID*	Customer Name*				Add
Logoff	Insured	BR Number	11111111	Sample Company				
	Proposer	BR Number	11111111	Sample Company				
	Add Row		Submit Cancel					

Next, input the details of the 'Application' tab.

Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

18:13:18
USER: super1

Connect DTTN	Insurance Application							
Create Application	Please click on each tab to fill in all necessary information for Create/Modify Application.							
Maintain Application	Create Application							
Maintain Policy	★Mandatory Field							
Process Payment	Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Enquiry	Application information							
Setup	Insurance type	General						
Logoff	Insurance class	Marine Cargo for DTTN						
	Application number*	App-000-001						
	Reference number							
	Business/Occupation							
	Location of Risk							
	Application date*	21/09/2007						
	Submission date							
	Capture date							
	Application status*	Proposal						
	Application status change date	21/09/2007						
	Last proposal date	21/09/2007						
	Renewable							
	Application Details							
	For creating the multiple proposals, please click on the plus icon to show the Proposal Section. After proposal section show up, please enter Proposal Insurer and Proposal.							
	+ Proposal							
	+ Reference Note							
	Submit Cancel							

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The 'Policy' tab.

Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

18:13:31
USER: super1

Connect DTTN	Insurance Application							
Create Application	Please click on each tab to fill in all necessary information for Create/Modify Application.							
Maintain Application	Create Application							
Maintain Policy	★Mandatory Field							
Process Payment	Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Enquiry	Policy Information							
Setup	Insurance class	Marine Cargo for DTTN						
Logoff	Policy number							
	Endorsement number							
	Sequence number							
	Basic Indicator*	<input checked="" type="radio"/> Basic <input type="radio"/> Rider						
	Policy issue date							
	Policy effective date							
	Policy expiry date							
	Policy status change date							
	Policy pay-to-date							
	Policy status	Proposal						
	Cover Note							
	Other Interested Party							
	Coverage & Premium							
	Coverage Currency	--Please select--						
	Premium currency	HKD						
	Sum Insured							
	Coverage Premium							
	Total Premium							
	Discount Rate	0 %						
	Client Net Premium							
	Commission rate	0 %						

The 'Details' tab.

Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

USER: super1

Insurance Application
Please click on each tab to fill in all necessary information for Create/Modify Application.

Create Application
★Mandatory Field

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Marine Cargo Details							
Cover note number*	CN-000-001						
LC Reference number*	LC-000-001						
LC Currency	<input type="button" value="▼"/>						
LC Amount	<input type="button" value=""/>						
Insurance Amount	<input type="button" value=""/>						
LC Expiry Date	<input type="button" value=""/>						
Annual Open Cover Reference	<input type="button" value=""/>						
Trade Term	<input type="button" value=""/>						
Vessel Name	Sample Vessel						
Shipping from	Hong Kong						
Shipping to 1	Tokyo Japan						
Shipping to 2	<input type="button" value=""/>						
Lastest Shipment date	<input type="button" value=""/>						
Cover note date	<input type="button" value=""/>						
Goods description 1	2,000 pieces of T-Shirt						
Goods description 2	<input type="button" value=""/>						
Goods description 3	<input type="button" value=""/>						
Goods description 4	<input type="button" value=""/>						
Goods description 5	<input type="button" value=""/>						
Policy Information							
Product reference number	<input type="button" value=""/>						

The 'Broker' tab.

Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

18:14:50
USER: super1

ISU Lite FORM

Insurance Application
Please click on each tab to fill in all necessary information for Create/Modify Application.

Create Application
★Mandatory Field

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Agency Information							
Mode*	<input checked="" type="radio"/> Broker						
Broker Code*	Sample Broker(B1) <input type="button" value="▼"/>						
Submit Cancel							

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The 'Insurer' tab.

Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

ISU Lite FORM

18:14:57
USER: super1

Connect DTTN **Insurance Application**
Please click on each tab to fill in all necessary information for Create/Modify Application.

Create Application **Create Application**
★Mandatory Field

Maintain Application **Customer** **Application** **Policy** **Details** **Broker** **Insurer** **Party** **Settlement**

Maintain Policy

Process Payment

Enquiry

Setup **Insurer Information**
Insurer Code★ **DEFAULT(999)**

Logoff

Submit **Cancel**

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The 'Party' tab.

Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

ISU Lite FORM

18:15:03
USER: super1

Connect DTTN **Insurance Application**
Please click on each tab to fill in all necessary information for Create/Modify Application.

Create Application **Create Application**
★Mandatory Field

Maintain Application **Handling Party Information**

Maintain Policy

Process Payment

Enquiry

Setup **Handling Unit★** **Department Code** **Contribution★**
Main Branch (001) **Default Department** 100

Logoff

Handling person role★ **Handling person number★** **Handling person Percent★** **Handling person Phone Number**
Referrer **System Default** 100

Submit **Cancel**

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The 'Settlement' tab.

Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

ISU Lite FORM

18:15:12
USER: super1

Connect DTTN **Insurance Application**
Please click on each tab to fill in all necessary information for Create/Modify Application.

Create Application **Create Application**
*Mandatory Field

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Premium Settlement Mode	Net						
Premium Settle Channel	Cash						
Debit Number Reference							

Settlement Account Information
Currency Account Number

Add **Submit** **Cancel**

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After input the details, click the 'Submit' button and the 'Confirmation' page will be shown for confirmation. Click 'Submit' again to confirm the application creation.

Confirm Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

ISU Lite FORM

18:15:30
USER: super1

Connect DTTN **Insurance Application**
Please click on each tab to confirm all necessary information for Create/Modify Application.

Create Application **Confirm Create Application**

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Insurance customer type	Customer Type	Customer ID	Customer Name				
Insured	BR Number	11111111	Sample Company				
Proposer	BR Number	11111111	Sample Company				

Submit **Cancel**

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Action Completed - ISU-Lite powered by DTTN - Microsoft Internet Explorer

ISU Lite FORM

18:15:43
USER: super1

create action is successfully completed.

OK

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Receive Quotation

The insurance service providers will send the quotation to you after received your application. You can receive quotation from 'Connect DTTN' function.

Task	Next Schedule	Last Executed By	Last Start Time	Last End Time	Last Executed Result	Action
Receive documents from DTTN(get_DTTN)	28/09/2007 19:21:44	admin	28/09/2007 19:19:41	28/09/2007 19:19:44	Success (Information)	Go
Send documents to DTTN(put_DTTN)	05/10/2007 14:18:36	admin	05/10/2007 14:16:35	05/10/2007 14:16:36	Success (Information)	Go

After executing the job 'Receive documents from DTTN', you can check the result:

Batch Job	Receive documents from DTTN
Log Time	Message Content
05/10/2007 15:42:48 Insurance Document file: IQ0710050000013.XML processed.	
05/10/2007 15:42:48 There are totally 1 file(s) processed.	

And in the enquiry page, you can see that one more document, i.e. the quotation from DTTN is received:

Application and Policy Details					
DTTN Documents		Document Type	Filename	Put/Get	Put/Get Date
Insurance Application		20071005\IA0710050000021.XML	View	PUT	05/10/2007
Insurance Quotation		20071005\IQ0710050000021.XML	View	GET	05/10/2007

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Insurance class	Marine Cargo for DTTN						
Policy number	PN-000-003						
Endorsement number							
Sequence number							
Basic Indicator	Basic						
Policy effective date							
Policy issue date							
Policy expiry date							
Policy status change date	05/10/2007						
Policy pay-to-date							
Policy status	Proposal						
Cover Note	Y						

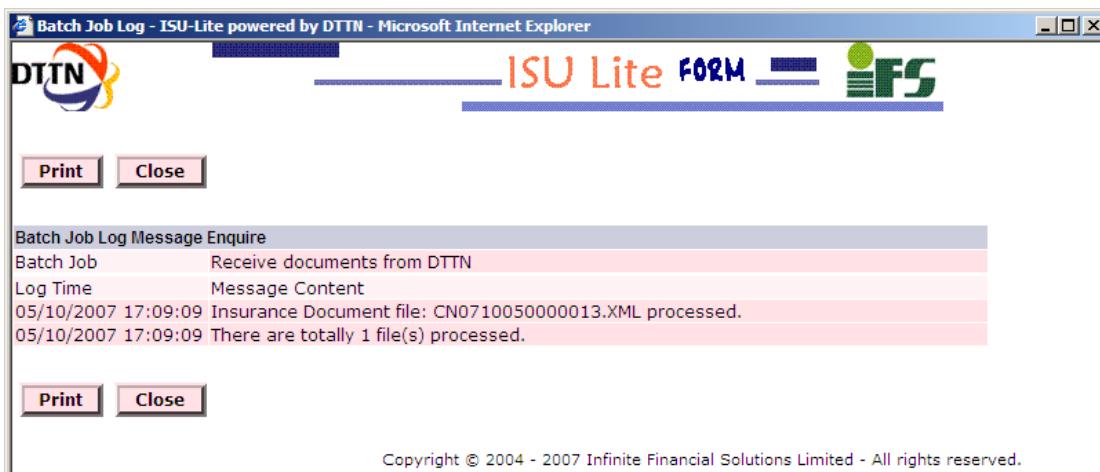
From the 'Put/Get' column, you can tell the Insurance Quotation is 'GOT', i.e. received from DTTN.

Receive Cover Note and Insurance Invoice

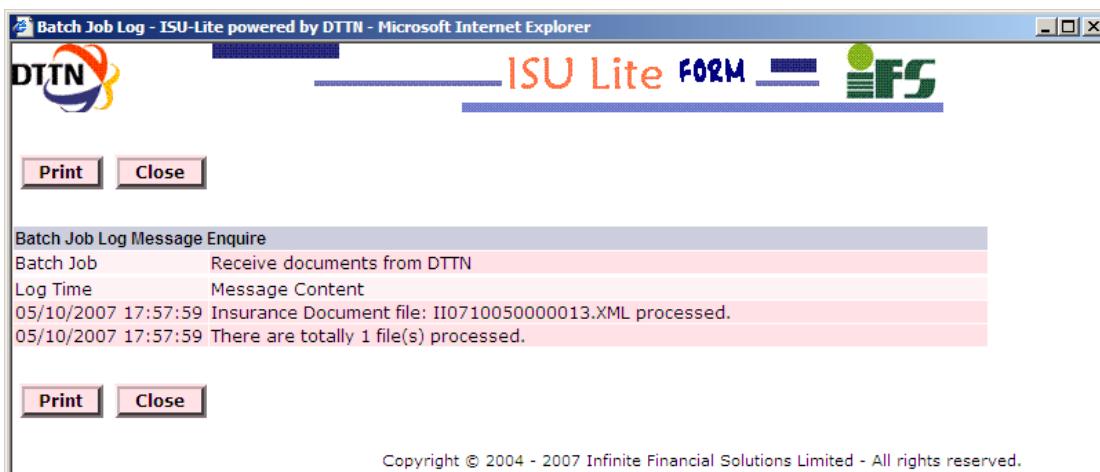
Upon your confirmation to the quotation, insurance services provider will send you the cover note as well as the insurance invoice. Similar to receiving quotation, you can receive the document through the 'Receive documents from DTTN' function.

After executing the job 'Receive documents from DTTN', you can check the result:

Received Cover Note:



Received Invoice:



And in the enquiry page, you can see that one more document, i.e. the quotation from DTTN is received:

Marine Cargo Insurance Enquiry - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

17:59:20
USER: admin

Connect DTTN **Insurance Application**
Please click on each tab to confirm all necessary information for Create/Modify Application.

Create Application

Maintain Application **Application and Policy Details**

Maintain Policy

Process Payment

Enquiry

Setup

Logoff

DTTN Documents

Document Type	Filename	Put/Get	Put/Get Date
Cover Note	20071005\CN0710050000021.XML View	GET	05/10/2007
Insurance Application	20071005\IA0710050000021.XML View	PUT	05/10/2007
Insurance Invoice	20071005\II0710050000021.XML View	GET	05/10/2007
Insurance Quotation	20071005\IQ0710050000021.XML View	GET	05/10/2007

Customer **Application** **Policy** **Details** **Broker** **Insurer** **Party** **Settlement**

Insurance customer type	Customer Type	Customer ID	Customer Name
Insured	BR Number	11111111	Sample Company
Proposer	BR Number	11111111	Sample Company

OK

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Receive Payment Confirmation

After you have paid according to the invoice and notification is received by the insurance service provider, a payment confirmation document will be sent to you. Similar to receiving other documents, you can receive the document through the 'Receive documents from DTTN' function.

After executing the job 'Receive documents from DTTN', you can check the result:

Received Payment Confirmation:

Batch Job Log - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

Print **Close**

Batch Job Log Message Enquire

Batch Job	Receive documents from DTTN
Log Time	Message Content
08/10/2007 11:35:35	Insurance Document file: PN0710050000013.XML processed.
08/10/2007 11:35:35	There are totally 1 file(s) processed.

Print **Close**

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From the application enquiry screen, you can see that one more document of payment confirmation is received. In addition, the status of settlement tab shows that the payment is settled:

Marine Cargo Insurance Enquiry - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

11:39:03
USER: admin

Connect DTTN	Insurance Application																																																																																																						
Create Application	Please click on each tab to confirm all necessary information for Create/Modify Application.																																																																																																						
Maintain Application	Application and Policy Details																																																																																																						
Maintain Policy	DTTN Documents																																																																																																						
Process Payment	Document Type	Filename	Put/Get	Put/Get Date																																																																																																			
Enquiry	Cover Note	20071005\CN0710050000021.XML View	GET	05/10/2007																																																																																																			
Setup	Insurance Application	20071005\IA0710050000021.XML View	PUT	05/10/2007																																																																																																			
Logoff	Insurance Invoice	20071005\II0710050000021.XML View	GET	05/10/2007																																																																																																			
	Insurance Quotation	20071005\IQ0710050000021.XML View	GET	05/10/2007																																																																																																			
	Payment Confirmation	20071008\PN0710050000021.XML View	GET	08/10/2007																																																																																																			
	<table border="1"> <thead> <tr> <th>Customer</th> <th>Application</th> <th>Policy</th> <th>Details</th> <th>Broker</th> <th>Insurer</th> <th>Party</th> <th>Settlement</th> </tr> </thead> <tbody> <tr> <td colspan="8">- Premium Settlement History</td> </tr> <tr> <td>Collection Date</td> <td>Premium Settlement Mode</td> <td>Premium Settle Channel</td> <td>Premium Premium Settled</td> <td>Premium Settlement Reference</td> <td>Debit / Credit</td> <td colspan="2">Status</td> </tr> <tr> <td>08/10/2007</td> <td>Net</td> <td>Cash</td> <td>100,000.00</td> <td>payment done on 8.10.2007</td> <td></td> <td colspan="2">ST</td> </tr> <tr> <td colspan="8">Premium Settlement Method</td> </tr> <tr> <td colspan="2">Premium Settlement Mode</td> <td colspan="6">Net</td> </tr> <tr> <td colspan="2">Premium Settle Channel</td> <td colspan="6">Cash</td> </tr> <tr> <td colspan="2">Premium Settlement Reference</td> <td colspan="6"></td> </tr> <tr> <td colspan="2">Is GL Generated</td> <td colspan="6"></td> </tr> <tr> <td colspan="8">Settlement Account Information</td> </tr> <tr> <td>Currency</td> <td colspan="7">Account Number</td> </tr> <tr> <td colspan="8" style="text-align: center;"><input type="button" value="OK"/></td> </tr> </tbody> </table>							Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement	- Premium Settlement History								Collection Date	Premium Settlement Mode	Premium Settle Channel	Premium Premium Settled	Premium Settlement Reference	Debit / Credit	Status		08/10/2007	Net	Cash	100,000.00	payment done on 8.10.2007		ST		Premium Settlement Method								Premium Settlement Mode		Net						Premium Settle Channel		Cash						Premium Settlement Reference								Is GL Generated								Settlement Account Information								Currency	Account Number							<input type="button" value="OK"/>							
Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement																																																																																																
- Premium Settlement History																																																																																																							
Collection Date	Premium Settlement Mode	Premium Settle Channel	Premium Premium Settled	Premium Settlement Reference	Debit / Credit	Status																																																																																																	
08/10/2007	Net	Cash	100,000.00	payment done on 8.10.2007		ST																																																																																																	
Premium Settlement Method																																																																																																							
Premium Settlement Mode		Net																																																																																																					
Premium Settle Channel		Cash																																																																																																					
Premium Settlement Reference																																																																																																							
Is GL Generated																																																																																																							
Settlement Account Information																																																																																																							
Currency	Account Number																																																																																																						
<input type="button" value="OK"/>																																																																																																							

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Receive Insurance Policy or Certificate

Insurance services provider will issue to you either an insurance policy or an insurance certificate. You can receive the document as above. The result is as follows:

Batch Job Log - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

Batch Job Log Message Enquire	
Batch Job	Receive documents from DTTN
Log Time	Message Content
08/10/2007 14:37:48	Insurance Document file: IP0710050000011.XML processed.
08/10/2007 14:37:48	There are totally 1 file(s) processed.

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And the status is shown as 'Policy Issued':

Marine Cargo Insurance Enquiry - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

14:39:01
USER: admin

Connect DTTN	Insurance Application						
Create Application	Please click on each tab to confirm all necessary information for Create/Modify Application.						
Maintain Application	Application and Policy Details						
Maintain Policy	DTTN Documents						
Process Payment	Document Type	Filename	Put/Get	Put/Get Date			
Enquiry	Cover Note	20071005\CN0710050000021.XML View	GET	05/10/2007			
Setup	Insurance Application	20071005\IA0710050000021.XML View	PUT	05/10/2007			
Logoff	Insurance Invoice	20071005\II0710050000021.XML View	GET	05/10/2007			
	Insurance Policy	20071008\IP0710050000021.XML View	GET	08/10/2007			
	Insurance Quotation	20071005\IQ0710050000021.XML View	GET	05/10/2007			
	Payment Confirmation	20071008\PN0710050000021.XML View	GET	08/10/2007			
	Customer	Application	Policy	Details	Broker	Insurer	Party
	Application information						
	Insurance type	General					
	Insurance class	Marine Cargo for DTTN					
	Application number	0710050000021					
	Reference number						
	Business/Occupation						
	Location of Risk						
	Application date	21/09/2007					
	Submission date						
	Capture date						
	Application status	Policy Issued PI					
	Application status change date	08/10/2007					
	Last proposal date	21/09/2007					

For receiving insurance certificate:

Batch Job Log - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

Print Close

Batch Job Log Message Enquire

Batch Job	Receive documents from DTTN
Log Time	Message Content
09/10/2007 09:28:47	Insurance Document file: IC0710080000020.XML processed.
09/10/2007 09:28:47	There are totally 1 file(s) processed.

Print Close

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And the enquiry screen showing the certificate received:

Marine Cargo Insurance Enquiry - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

09:31:12
USER: admin

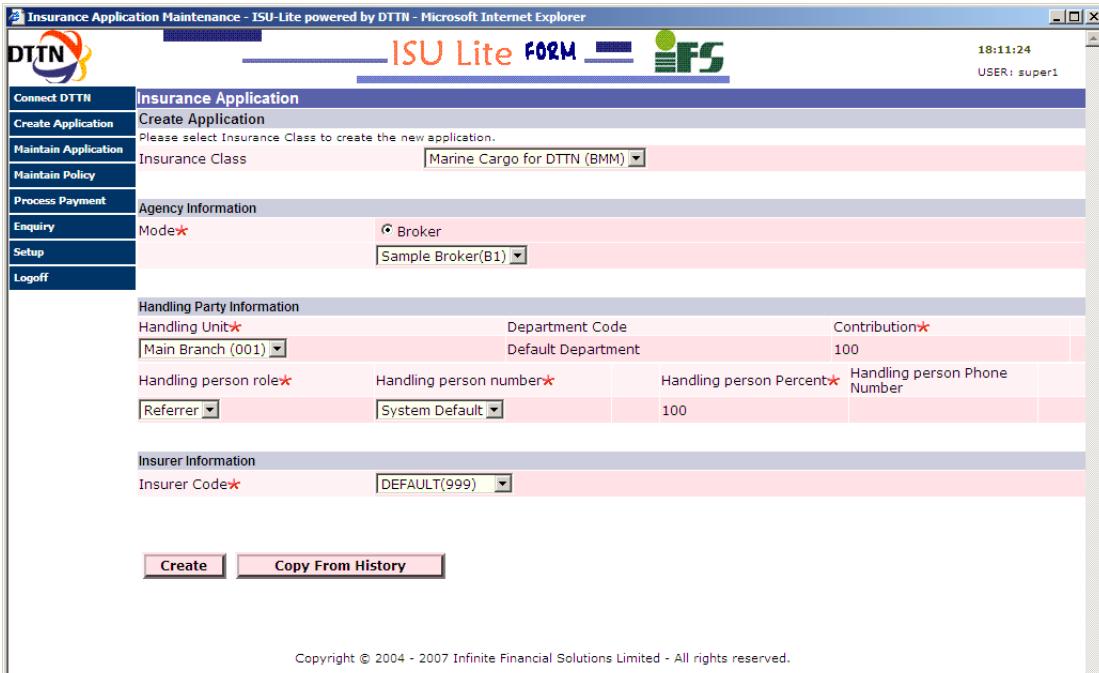
Connect DTTN	Insurance Application						
Create Application	Please click on each tab to confirm all necessary information for Create/Modify Application.						
Maintain Application	Application and Policy Details						
Maintain Policy	DTTN Documents						
Process Payment	Document Type	Filename	Put/Get	Put/Get Date			
Enquiry	Insurance Certificate	20071009\IC0710080000030.XML View	GET	08/10/2007			
Setup	Insurance Declaration	20071008\ID0710080000030.XML View	PUT	08/10/2007			
Logoff	Customer	Application	Policy	Details	Broker	Insurer	Party
	Insurance customer type						
	Insured	Customer Type	Customer ID	Customer Name			
	Proposer	BR Number	11111111	Sample Company			
	Proposer	BR Number	11111111	Sample Company			
	OK						

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Create Declaration

You can create insurance declaration from the system by using the copy function in the application creation screen. You may create a new one starting from scratch as well but please note that the cover note number should be the same for the cover note previously issued.

Select 'Copy From History':



Insurance Application Maintenance - ISU-Lite powered by DTTN - Microsoft Internet Explorer

ISU Lite FORM 

18:11:24
USER: super1

Connect DTTN **Insurance Application**

Create Application
Please select Insurance Class to create the new application.

Maintain Application Insurance Class: Marine Cargo for DTTN (BMM)

Maintain Policy

Process Payment

Enquiry Mode: Broker
Referrer: Sample Broker(B1)

Setup

Logoff

Handling Party Information

Handling Unit*: Main Branch (001) Department Code: Default Department: Contribution*: 100

Handling person role*: Referrer: Handling person number*: System Default Handling person Percent*: 100 Handling person Phone Number: 100

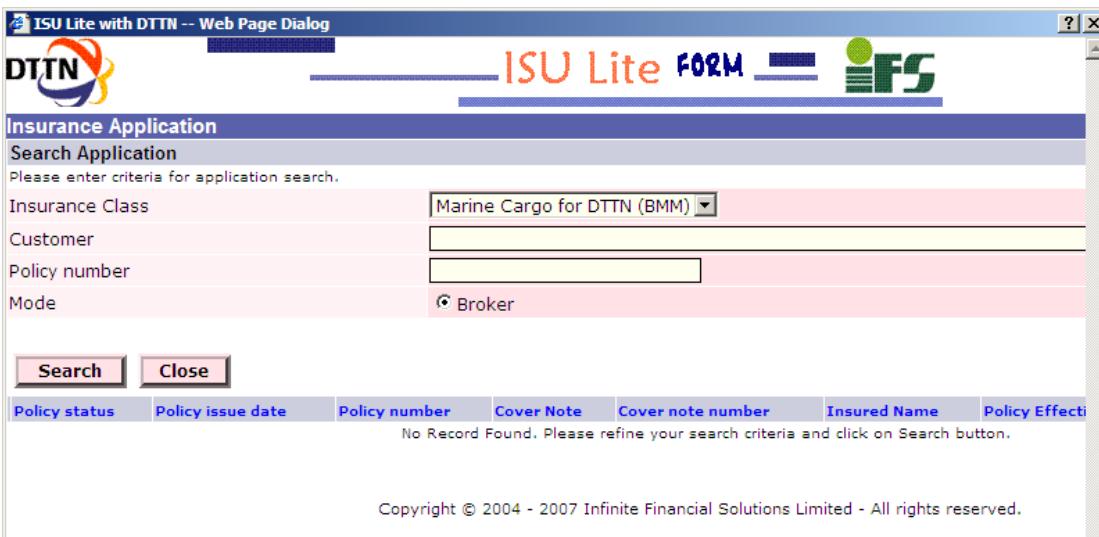
Insurer Information

Insurer Code*: DEFAULT(999)

Create **Copy From History**

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Then, a selection screen will be shown for searching old policy:



ISU Lite with DTTN -- Web Page Dialog

ISU Lite FORM 

Insurance Application

Search Application
Please enter criteria for application search.

Insurance Class: Marine Cargo for DTTN (BMM)

Customer:

Policy number:

Mode: Broker

Search **Close**

Policy status Policy issue date Policy number Cover Note Cover note number Insured Name Policy Effect

No Record Found. Please refine your search criteria and click on Search button.

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The result list will be shown after clicking the 'Search' button:

ISU Lite with DTTN -- Web Page Dialog

ISU Lite FORM

Insurance Application

Search Application

Please enter criteria for application search.

Insurance Class	Marine Cargo for DTTN (BMM)
Customer	
Policy number	
Mode	<input checked="" type="radio"/> Broker

Search **Close**

	Policy status	Policy issue date	Policy number	Cover Note	Cover note number	Insured Name	Policy E
Copy	Proposal				CN-000-001	Sample Company	-
Copy	Proposal				CN-000-002	Sample Company	-
Copy	Confirmed		PN-000-003	Y	CN-000-003	Sample Company	08/10/2

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Then you can click the 'Copy' button to copy the existing policy. Then, the application creation screen will be filled with previous data. We should update the fields accordingly. For declaration creation, please uncheck the box 'Cover Note'.

Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

ISU Lite FORM

Insurance Application

Please click on each tab to fill in all necessary information for Create/Modify Application.

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
----------	-------------	--------	---------	--------	---------	-------	------------

Policy Information

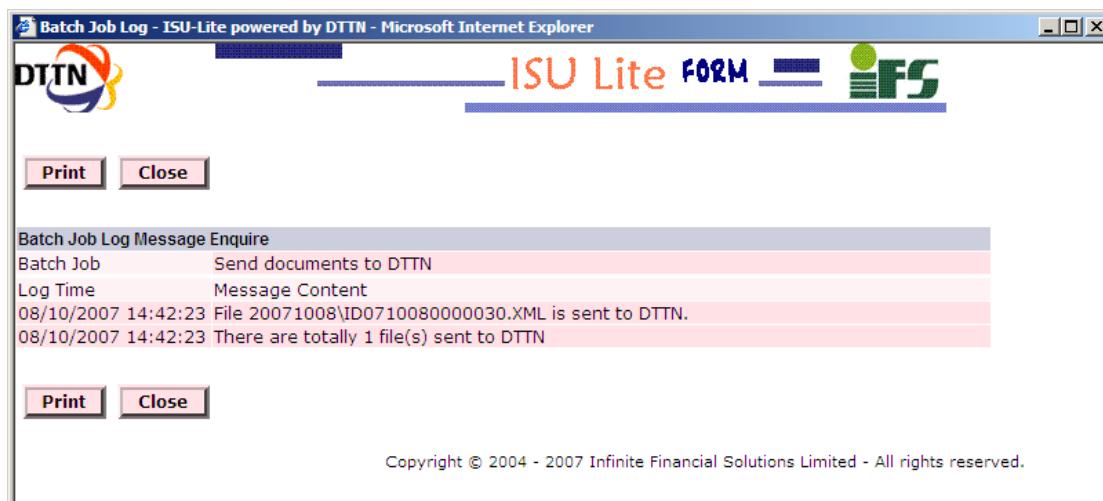
Insurance class: Marine Cargo for DTTN
 Policy number: PN-001-003
 Endorsement number:
 Sequence number:
 Basic Indicator: Basic Rider
 Policy issue date: 08/10/2007
 Policy effective date: 08/10/2007
 Policy expiry date: 08/10/2007
 Policy status change date: 08/10/2007
 Policy pay-to-date:
 Policy status:
 Cover Note:
 Other Interested Party:

Coverage & Premium

Coverage Currency: HKD
 Premium currency: HKD
 Exchange Rate: 1
 Sum Insured:
 Coverage Premium:
 Total Premium:
 Discount Rate: %
 Discount Amount:
 Client Net Premium: 100000

Similar as creating an application, we have to click the 'Submit' button, then the confirmation page will be shown and you have to confirm the submission accordingly.

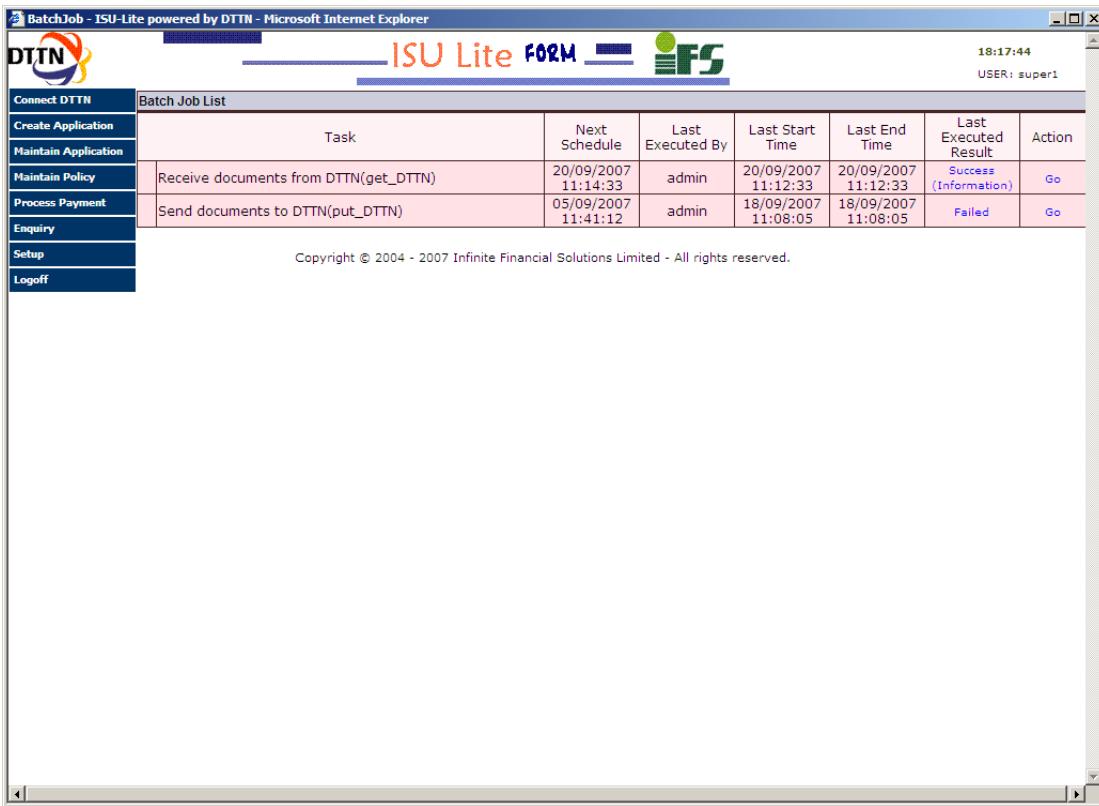
After the creation, a declaration document is ready for sending to DTTN. You can use the 'Send documents to DTTN' function to send the declaration document.



Connect DTTN

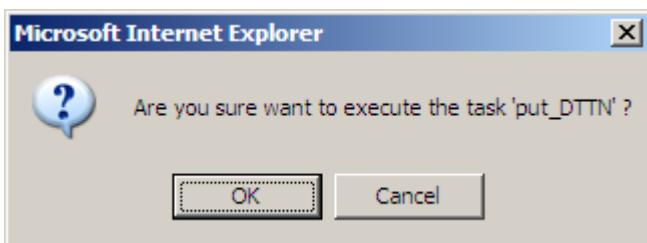
Send documents to DTTN

After the creation of documents in the system, supervisor can send the documents to the receiving party through DTTN. You can start the 'Send' function from 'Connect DTTN' menu. The 'Batch Job List' will be shown with two tasks. You can click the 'Go' button of 'Send documents to DTTN(put_DTTN)' to send the documents prepared in the system to DTTN.

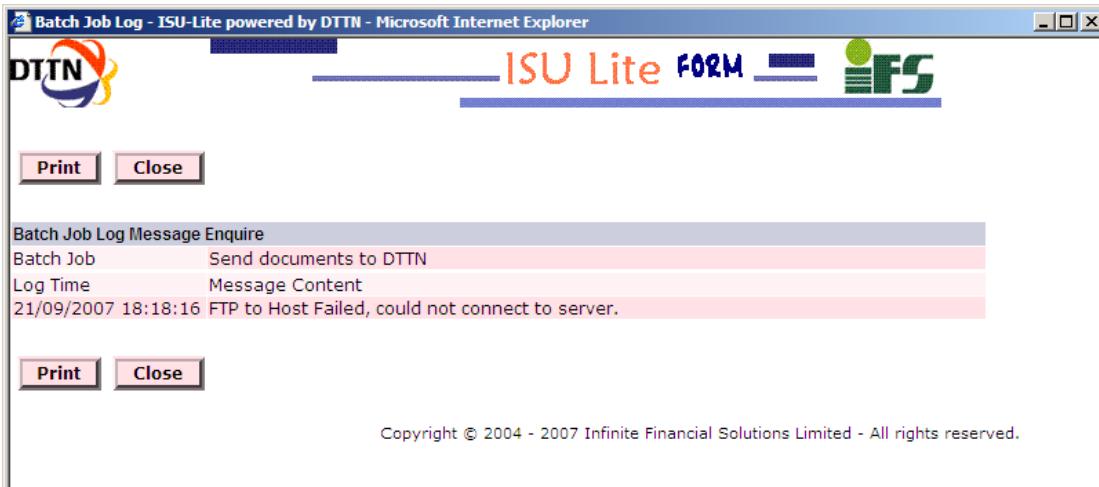


Task	Next Schedule	Last Executed By	Last Start Time	Last End Time	Last Executed Result	Action
Receive documents from DTTN(get_DTTN)	20/09/2007 11:14:33	admin	20/09/2007 11:12:33	20/09/2007 11:12:33	Success (Information)	Go
Send documents to DTTN(put_DTTN)	05/09/2007 11:41:12	admin	18/09/2007 11:08:05	18/09/2007 11:08:05	Failed	Go

The system will further ask you for confirmation before actual execution.



You can also click the link in the column 'Last Executed Result' to view the last execution result. For example, the following message indicated that the job failed last time as the system can not connect to DTTN network.



Batch Job Log - ISU-Lite powered by DTTN - Microsoft Internet Explorer

ISU Lite FORM

Print Close

Batch Job Log Message Enquire

Batch Job Send documents to DTTN

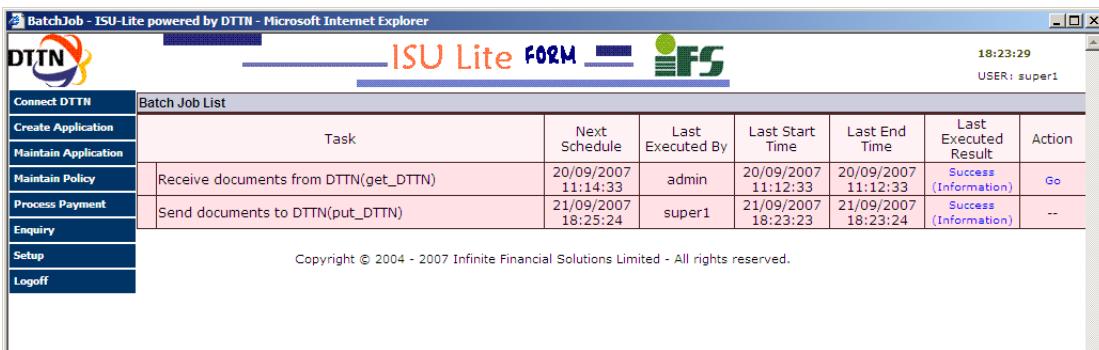
Log Time Message Content

21/09/2007 18:18:16 FTP to Host Failed, could not connect to server.

Print Close

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After the job is executed successfully, the last start time and last end time fields will be updated.



BatchJob - ISU-Lite powered by DTTN - Microsoft Internet Explorer

ISU Lite FORM

18:23:29

USER: super1

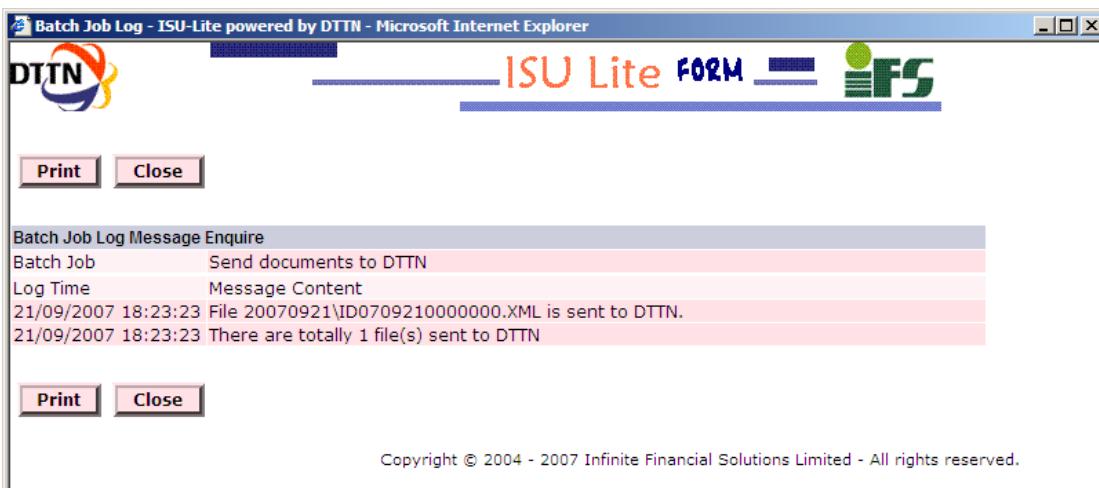
Connect DTTN

Batch Job List

	Task	Next Schedule	Last Executed By	Last Start Time	Last End Time	Last Executed Result	Action
Create Application	Receive documents from DTTN(get_DTTN)	20/09/2007 11:14:33	admin	20/09/2007 11:12:33	20/09/2007 11:12:33	Success (Information)	Go
Maintain Application	Send documents to DTTN(put_DTTN)	21/09/2007 18:25:24	super1	21/09/2007 18:23:23	21/09/2007 18:23:24	Success (Information)	--

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We can click the link to see the result. We can see that it shows that one document is sent to DTTN.



Batch Job Log - ISU-Lite powered by DTTN - Microsoft Internet Explorer

ISU Lite FORM

Print Close

Batch Job Log Message Enquire

Batch Job Send documents to DTTN

Log Time Message Content

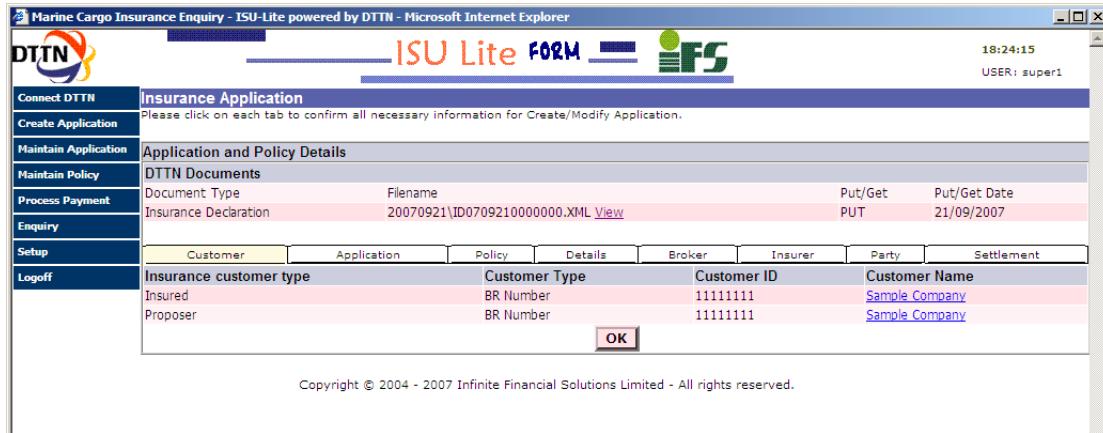
21/09/2007 18:23:23 File 20070921\ID0709210000000.XML is sent to DTTN.

21/09/2007 18:23:23 There are totally 1 file(s) sent to DTTN

Print Close

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We can enquire the document once again and see that the 'Put/Get Date' column is updated after the document is sent to DTTN.



Marine Cargo Insurance Enquiry - ISU-Lite powered by DTTN - Microsoft Internet Explorer

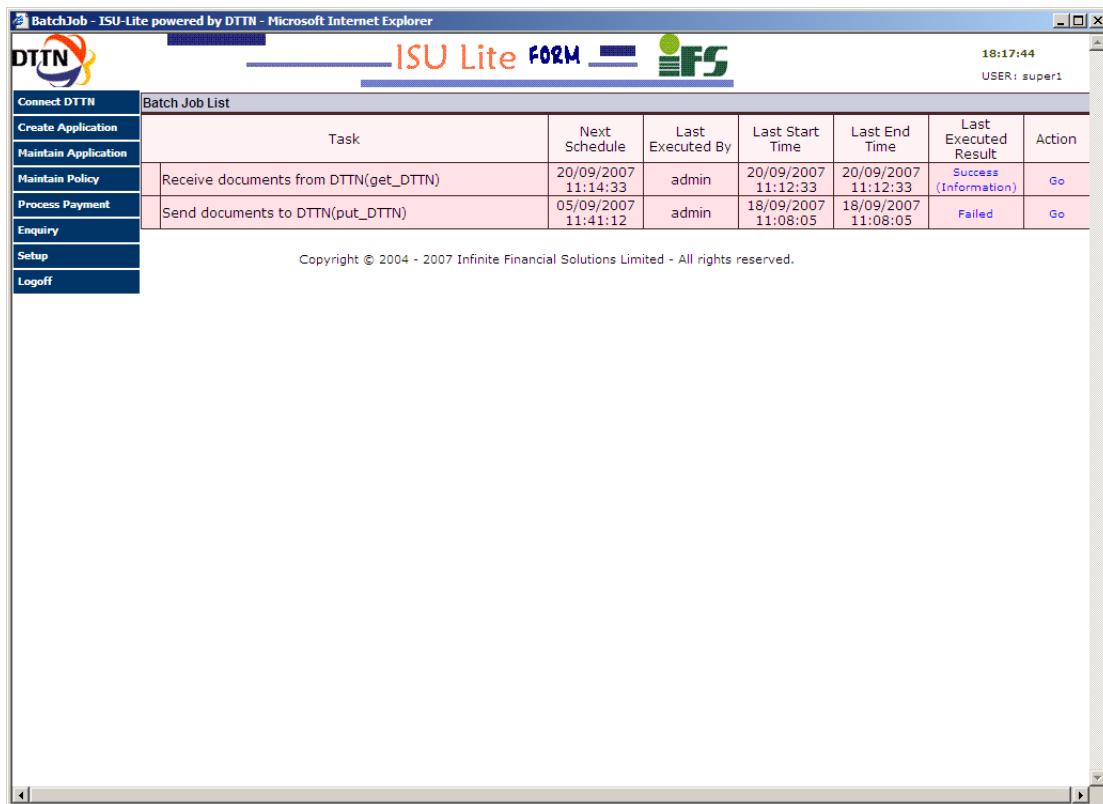
ISU Lite FORM

18:24:15
USER: super1

Connect DTTN Insurance Application
 Create Application Please click on each tab to confirm all necessary information for Create/Modify Application.
 Maintain Application Application and Policy Details
 Maintain Policy DTTN Documents
 Process Payment Document Type Filename Put/Get Put/Get Date
 Insurance Declaration 20070921\ID070921000000.XML [View](#) PUT 21/09/2007
 Enquiry
 Setup Customer Application Policy Details Broker Insurer Party Settlement
 Logoff Insurance customer type Customer Type Customer ID Customer Name
 Insured BR Number 11111111 Sample Company
 Proposer BR Number 11111111 Sample Company
 OK
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Receive documents from DTTN

You can start the 'Receive' function from 'Connect DTTN' menu. The 'Batch Job List' will be shown with two tasks. You can click the 'Go' button of 'Receive Document from DTTN(get_DTTN)' to receive the documents sent from the counterparties through DTTN.



BatchJob - ISU-Lite powered by DTTN - Microsoft Internet Explorer

ISU Lite FORM

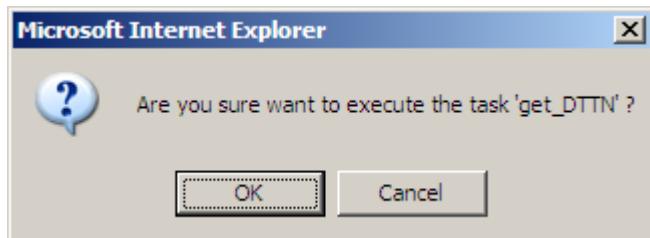
18:17:44
USER: super1

Connect DTTN Batch Job List
 Create Application
 Maintain Application
 Maintain Policy
 Process Payment
 Enquiry
 Setup
 Logoff

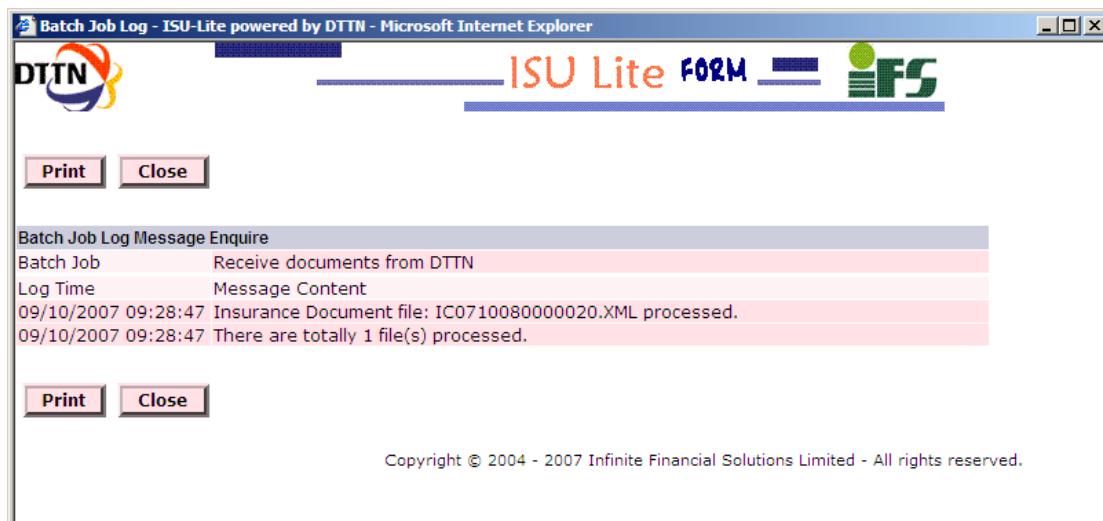
Task	Next Schedule	Last Executed By	Last Start Time	Last End Time	Last Executed Result	Action
Receive documents from DTTN(get_DTTN)	20/09/2007 11:14:33	admin	20/09/2007 11:12:33	20/09/2007 11:12:33	Success (Information)	Go
Send documents to DTTN(put_DTTN)	05/09/2007 11:41:12	admin	18/09/2007 11:08:05	18/09/2007 11:08:05	Failed	Go

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The system will further ask you for confirmation before actual execution.



After the job is executed successfully, the last start time and last end time fields will be updated and you can click the link the see the result.

A screenshot of a Microsoft Internet Explorer window titled "Batch Job Log - ISU-Lite powered by DTTN - Microsoft Internet Explorer". The window displays a log message. At the top, there are "Print" and "Close" buttons. Below that is a section titled "Batch Job Log Message Enquire". The log entries are as follows:

Batch Job	Receive documents from DTTN
Log Time	Message Content
09/10/2007 09:28:47	Insurance Document file: IC0710080000020.XML processed.
09/10/2007 09:28:47	There are totally 1 file(s) processed.

At the bottom of the window, there are "Print" and "Close" buttons again, and a copyright notice: "Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved."